

# REQUEST FOR PROPOSALS – STRATEGIC PLANNING SERVICES

*This document is available in French upon request at [national@ywcacanada.ca](mailto:national@ywcacanada.ca)*

**Date issued: Tuesday, August 8, 2023**

**Proposal Deadline: Friday, September 8, 2023 at 5pm ET**

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## 1.0 INTRODUCTION

### 1.1 Purpose of RFP

On behalf of the Board of Directors of YWCA Canada, the Strategic Planning Advisory Committee invites strategic planning service firms to submit proposals to develop a new strategic plan for YWCA Canada.

### 1.2 Background

YWCA Canada acknowledges that its national office and its member associations are situated upon traditional and current Indigenous territories. These lands are covered by treaties to peaceably share and care for the resources around the territories. Today, these lands are home to many Indigenous Peoples from across Turtle Island (North America), and we recognize the historical oppression and inequalities that they continue to face. YWCA Canada is conscious of its role in truth and reconciliation efforts and is committed to rebuilding and renewing respectful relations between Indigenous and non-Indigenous people.

Incorporated in 1893, YWCA Canada is a charitable, voluntary organization, which serves as the national coordinating body for the YWCA movement in Canada. YWCA Canada is the country's oldest and largest women's multi-service association. With 30 Member Associations operating in more than 400 districts and communities across the country, our programs - which address personal safety, economic security, and well-being – reach out to women and girls in nine provinces and two territories. YWCA Canada is the single largest national provider of shelter to women, children, and teen girls fleeing domestic violence. We are the largest provider of literacy, life skills, employment, and counseling programs in the country and the second largest provider of childcare services.

YWCA Canada is a leading voice for women, girls, Two-Spirit, and gender diverse people in the country. For over 150 years, we've been at the forefront of a movement: to fight gender-based violence, build affordable housing and advocate for affordable childcare and workplace equity. We work to advance gender equity by responding to urgent needs in communities, through national advocacy and grassroots initiatives. Local YWCAs invest over \$258 million annually to support over 330,000 individuals across the nation. Today, we engage young leaders, diverse communities, and corporate partners to achieve our vision of a safe and equitable Canada for all. YWCA Canada is part of a global movement, World YWCA, working towards gender equity in more than 120 countries and 20,000 local communities.

## YWCA CANADA'S VISION

Empowered women and girls in a safe and equitable society

## YWCA CANADA'S MISSION

Advance gender equity for all women through informed advocacy and strong Member Associations

Read More:

For more information about YWCA Canada visit [www.ywcacanada.ca](http://www.ywcacanada.ca) or find us on Twitter @YWCA\_Canada or Facebook at [www.facebook.com/ywcacanada](https://www.facebook.com/ywcacanada).

### 1.3 Summary of Key RFP Information

**Contact Person (all questions, amendments and Proposals must be submitted via email to the Contact Person):**

Attn: Aline Nizigama, CEO  
YWCA Canada Strategic Planning Advisory Committee  
[ywcacanstratplan@gmail.com](mailto:ywcacanstratplan@gmail.com)

**Proposal Submission Deadline:**

September 7, 2023 5PM Eastern Standard Time

**Target Date for Notice of Award:**

End of September, 2023.

**Target Date to Commence Services:**

To be determined with successful Firm

### 1.4 Definitions

For the purposes of this document, the following definitions will apply:

**“Addendum”** or **“Addenda”** means a written amendment to the RFP;

**“Agreement”** means an agreement or retainer letter between the Preferred Firm and the Purchaser for the performance of the Services;

**“Contact Person”** means the persons identified as such in Section 1.3 Summary of Key RFP Information;

**“Firm”** or **“Firms”** refers to the entity that submits a proposal in response to this RFP;

**“Preferred Firm”** means the Firm selected by the Purchaser to enter into the Agreement;

“**Proposal**” means a Firm’s proposal submitted in response to this RFP;

“**Proposal Submission Deadline**” is the date identified as such in Section 1.3 Summary of Key RFP Information;

“**Purchaser**” refers to YWCA Canada, who is the purchasing authority pursuant to this RFP;

“**RFP**” means this RFP for Strategic Plan Services, issued by YWCA Canada; and

“**Services**” means the services described in the scope of services set out in Appendix 1.

“**Theory of Change**” means a methodology or a criterion for planning, participation, adaptive management, and evaluation that is used in companies, philanthropy, not-for-profit, international development, research, and government sectors to [promote social change](#). It is essentially a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context.

## **2.0 RFP Terms and Conditions**

### **2.1 Questions and Requests for Clarification**

Firms should direct any requests for clarifications or questions relating to this RFP by email to the Contact Person. If the Purchaser determines that, as a result of a question, a change to the RFP is required, the Purchaser will issue an Addendum and post such Addendum on the website ([www.ywcacanada.ca](http://www.ywcacanada.ca)).

### **2.2 Addenda**

The Purchaser may, in its sole discretion, amend this RFP at any time by issuing written Addenda through the Contact Person directly to Firms or by posting on the website ([www.ywcacanada.ca](http://www.ywcacanada.ca)). By submitting a Proposal, the Firm is deemed to have received, accepted, and understood the entire RFP including any and all Addenda.

### **2.3 No Lobbying**

All communication regarding the RFP must occur via the Contact Person. Firms shall not communicate with or attempt to communicate with YWCA Canada staff members, volunteers, or board members regarding the RFP process.

### **2.4 Acceptance of Terms**

By submitting a Proposal, a Firm is deemed to have read, completely understood, and accepted all terms and conditions of the RFP in full.

### **2.5 Revisions to a Proposal or Withdrawal of a Proposal**

A Firm may revise its Proposal provided that any such revision is in writing and is delivered to the Contact Person before the Proposal Submission Deadline. A Firm may withdraw its Proposal at any time before the Proposal Submission Deadline by submitting a written notice to the Contact Person that clearly and unequivocally states the Firm's intention to withdraw its Proposal.

If, prior to the Proposal Submission Deadline, a Firm fails to notify the Purchaser of an error and their Proposal is selected, the Firm shall not be entitled to any compensation or time by reasons of the error or its later correction.

### **2.6 Clarification of Firm's Proposals**

The Purchaser shall have the right but not the obligation at any time after the Proposal Submission Deadline to seek clarification from any Firm in respect of the firm's proposal, without contacting any other Firm.

## **2.7 Acceptance of Proposals**

This RFP is not an agreement to purchase services. The Purchaser is not obligated to select a Firm or to award or enter into an Agreement with any Firm, including the Preferred Firm or the Firm with the lowest price. The Purchaser may, in its sole discretion, accept or reject any Proposal for any reason. No contractual or other legal obligations arise on the part of the Purchaser by this RFP until such time as a final, written Agreement if any, is subsequently entered into with a Firm.

No part of this RFP will become part of any final Agreement between the Purchaser and the Firm unless specifically incorporated into a final written agreement. Any or all contents of the Proposal may become part of the final agreement.

The Purchaser reserves the right to re-issue this RFP or any other request for proposals for the same or similar Services at any time.

## **2.8 Expenses**

Firms are solely responsible for their own costs and expenses in preparing Proposals and participating in this RFP. The Purchaser will not be liable to pay any costs incurred by any Firm in preparing or submitting its Proposal for any reason.

## **2.9 Ownership of Proposals**

All documents including Proposals submitted to the Purchaser will become the property of the Purchaser.

## **2.10 Conflict of Interest**

Firms shall declare any and all conflicts of interest between the Firm and the Purchaser or any situation that may be reasonably perceived as a conflict of interest that exists now or may exist in the future. The Purchaser will review a Firm's conflict of interest disclosure and at its sole discretion decide whether a conflict of interest exists and determine the appropriate course of action. The Purchaser may disqualify any Proposals that in the Purchaser's opinion demonstrate a conflict of interest, whether or not declared in the Proposal.

## **2.11 Rights of Purchaser**

In addition to all other rights set out in this RFP, the Purchaser may, in its sole discretion:

- (a) cancel this RFP or disqualify a Proposal at any time;
- (b) waive any requirement of the RFP;
- (c) consider any prior experience with a Firm;
- (d) conduct or not conduct reference checks, including checking references which are not identified in a Proposal;
- (e) negotiate any aspect of a Proposal or a form of Agreement with a Firm; and
- (f) evaluate a Proposal in comparison to another Proposal.

## **2.12 Limitation of Damages**

Each Firm, by submitting a Proposal, irrevocably agrees to not bring any claims, whether for costs, expenses, losses, or damages or for any other matter whatsoever against the Purchaser or its directors, officers, advisors, employees, consultants or representatives for any reason, cause, or matter in relation to or arising from this RFP process.

## 3.0 PROPOSAL SUBMISSION REQUIREMENTS

### 3.1 Submission of Proposals

**Proposals must be submitted to the Contact Person before the Proposal Submission Deadline.**

### 3.2 Proposal Package

The Proposal should:

- (a) be submitted electronically to the Contact Person;
- (b) be concise, with a target of not exceeding 10 pages in length;
- (c) be accompanied by a cover letter certifying the accuracy of all information contained in the Proposal and acknowledging the terms and conditions set out in Appendix 1; and
- (d) address all requirements called for in this RFP, including a clear and concise narrative that addresses the topics set out in Section 3.3.

### 3.3 Proposal Narrative

Firms should submit a Proposal narrative that addresses the following, organized as below:

- (a) a brief overview of the Firm including legal name, address, and website. Identify the representative authorized to negotiate on behalf of the Firm and include full contact information;
- (b) a brief history of the Firm including years in business, description of its ownership and management structure and its lines of business and its core values;
- (c) information demonstrating that the Firm is independent, conscious of personal biases and has expertise with the Canadian not-for-profit sector.
- (d) a representative client list, identifying past or current relationships with national level organizations, other women-serving and/or other not-for-profit charitable organizations in Canada;



- (e) identification of project lead and key team member, including roles, responsibilities and qualifications with brief biographies or CVs;
- (f) description of Firm's relevant qualifications and experience in developing strategic plans of a similar nature as that contemplated in the Services. Include all information to meet the Purchaser's evaluation criteria below;
- (g) minimum of three references from organizations that can speak directly to the Firm's expertise with respect to the provision of strategic planning services of a similar nature. References should be able to speak to experience with proposed project personnel. Include name, title, and full contact information of referees;
- (h) proposed approach including a work plan to deliver the Services. Specify any assumptions;
- (i) fee quotation in relation to proposed work plan, clearly identifying a cost breakdown as appropriate, including travel and any out-of-pocket expenses. Specify applicable hourly rates, and any assumptions, and how the Firm will manage costs in excess of the budget;
- (j) information about any evaluation process during early-stage implementation of the strategic plan that the Firm has in place;
- (k) any additional information or materials which the Firm wishes to include to demonstrate capability to deliver the Services; and
- (l) a proposed form of Agreement (or retainer letter), if any, that the Firm would propose to enter into if selected as the Preferred Firm, any specific contract terms which the Firm would seek to include in the final Agreement, or any requested revisions to any contract terms identified in Appendix 1.

## 4.0 EVALUATION

Proposals will be evaluated by a committee formed by the Purchaser or Purchaser’s advisors. When carrying out the evaluation, the evaluation committee may, in confidence, obtain and rely upon any information or input from any other person. As part of the evaluation process, the Purchaser may request clarifications or rectifications from any Firm after the Proposal Submission Deadline and for that purpose may enter into separate and confidential discussions with individuals Firms.

The Purchaser intends to select the Proposal that in the Purchaser’s sole discretion, demonstrates the best value of the Purchaser, based on qualifications, personnel, project understanding, vision, proposed approach to achieving the Services and goal, and price.

Essential assets and attributes of the successful firm:

- Demonstrated experience in strategic planning, project management and group facilitation
- Demonstrated experience applying feminist, intersectional, and decolonizing approaches to convening and collaboration
- Experience working on justice, equity, diversity, and inclusion (JEDI), anti-racism and Reconciliation initiatives
- Capacity to work bilingually in English and French (facilitating meetings, engagements sessions, consultations) and deliver materials in both official languages

The Purchaser will base the evaluation on the following criteria (there are minimum points required to advance in the competition):

Evaluation Criterion	Weight
Credentials, qualifications, and professional experience <ul style="list-style-type: none"> <li>• Track record of JEDI, anti-racism, and Reconciliation work (15 points)</li> <li>• Strategic Planning Experience (15 points)</li> <li>• Experience working with feminist/social justice organizations in the non-profit sector (10 points)</li> </ul> TOTAL: 40 points (minimum required 35 points)	30%
Demonstrated expertise and ability to meet requirements per the scope of Services <ul style="list-style-type: none"> <li>• Firm experience /expertise and professional staff (15 points)</li> <li>• Project approach and methodology (10 points)</li> <li>• Ability to work and deliver material in French &amp; English (10 points)</li> </ul> TOTAL: 35 points (minimum required 30 points)	30%
Demonstrated ability and capacity based on client preferences	20%

<ul style="list-style-type: none"> <li>• Demonstrated track record of project management principles (5 points)</li> <li>• Understanding of YWCA Canada principles (10 points)</li> </ul> TOTAL: 15 points (minimum required 10 points)	
Competitiveness of proposed fees and thoroughness of proposal, proposed contract terms or conditions <ul style="list-style-type: none"> <li>• Completeness of the proposal (5 points)</li> <li>• Cost of services and products to be provided (5 points)</li> </ul> TOTAL: 10 points	20%
GRAND TOTAL: 100 points	100%

#### 4.1 Selection of Preferred Firm

If the Purchaser selects a Preferred Firm, then Purchaser may enter into discussions with the Preferred Firm to clarify any outstanding issues and attempt to finalize the terms of the Agreement.

If at any time the Purchaser reasonably forms the opinion that a mutually acceptable Agreement is not likely to be reached with a Preferred Firm within a reasonable time, then the Purchaser may at its sole discretion deliver to the Preferred Firm written notice to terminate discussion, in which event the Purchaser may enter into discussions with another Firm or terminate this RFP and proceed with the Services in some other manner or not at all.

## APPENDIX 1

### 1.0 BACKGROUND

YWCA Canada is governed by a national Board of Directors elected by Canadian Member Associations. YWCA Canada is a member of the World YWCA, a global movement that spans 125 countries and links 25 million women and girls worldwide.

YWCA Canada functions as a federation, with 30 autonomous YWCA Member Associations located throughout the country, each governed by local Boards of Directors. YWCA Canada's offices are located in Toronto, with a staff of 15-20 persons. The national office is led by the CEO of YWCA Canada. The CEO reports to YWCA Canada's Board of Directors.

YWCA Canada's national office is funded in large part through the membership fees of member associations and also receives funding through government project grants, corporate partnerships, and individual donors. It has an annual operating budget of

approximately \$1.5M, up to \$3M with projects. YWCA Canada is following a strategic plan which was approved by its membership in 2015 and expired in 2020.

The Strategic Plan framework guides the work of the YWCA at the local and national levels, supporting the alignment of the vision and brand of the federation, identifying advocacy focal points, developing capacity for programs and services, and the strategic deployment of human and financial resources.

**YWCA Canada works to build:**

- A strong voice for women in Canada;
- An effective women's multi-service network; and
- Efficient linkages within the YWCA both nationally and internationally.

**YWCA Canada Strategic Framework 2016-2020**

**Vision**

Empowered women and girls in a safe and equitable society

**Mission**

Advance gender equity for all women through informed advocacy and strong Member Associations

**Overarching Objective, Strategic Priorities and Directions**

**Overarching Objective: BUILDING A COUNTRY THAT WORKS FOR ALL WOMEN AND GIRLS**

<p><b>Strategic Priority 1: CREATING THE FUTURE TOGETHER</b></p> <p><b><u>Strategic Direction 1.1:</u></b> Effectively share power with, engage, and support young women of diverse communities, backgrounds, and identities to participate as leaders, decision-makers and equals at all levels of an inclusive movement.</p> <p><b><u>Strategic Direction 1.2:</u></b> Support the movement for Reconciliation to create</p>	<p><b>Strategic Priority 2: MAXIMIZING COLLECTIVE IMPACT</b></p> <p><b><u>Strategic Direction 2.1:</u></b> Strengthen Movement capacity and sustainability so we have the infrastructure and resources to transform our communities.</p> <p><b><u>Strategic Direction 2.2:</u></b> Share our expertise and align our efforts to</p>	<p><b>Strategic Priority 3: CONDUCTING INFORMED ADVOCACY</b></p> <p><b><u>Strategic Direction 3.1:</u></b> End violence against women and girls through advocacy for inclusive gender equality and the safety of women and girls.</p> <p><b><u>Strategic Direction 3.2:</u></b> Achieve economic equality through a focus on social conditions, colonial legacies, systemic barriers and</p>
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respectful, positive relationships with First Nation, Métis and Inuit peoples and communities including gendered reconciliation work.

**Strategic Direction 1.3:**

Be inclusive of newcomer, refugee, and immigrant women by ensuring they are treated with dignity and can exercise full and equal rights in society.

maximize the Movement's collective energy, creativity, and resources.

exclusions, gender income gaps and women's poverty.

**Strategic Direction 3.3:**

Foster the conditions for the creation and implementation of childcare nationally providing quality affordable early learning and care.

**Strategic Direction 3.4:**

Collaborate strategically to ensure homes for women and to end women's homelessness.

## 2.0 SCOPE OF SERVICES

### 2.1 General

By retaining an independent and expert strategic planning services firm to develop a draft four-year strategic plan, YWCA Canada's goal is that the draft plan be approved by the federation's membership during the June 2024 Annual Members Meeting. YWCA Canada wishes to develop a strategic plan that builds on the federation's history and strengths and also addresses current and emerging needs and trends to ensure a just and equitable future for all. The strategic plan may also identify issues that require further research and exploration.

### 2.2 Services

The successful Firm will be required to provide the following services:

- a) provide a detailed work plan for review and approval by the Purchaser;
- (b) liaise with the Strategic Planning Advisory Committee to gain an understanding of the YWCA Canada federation, the role of the strategic plan and to seek approval of: proposed methodologies for information gathering and consultation processes and communication strategies;
- (c) convene the Strategic Planning Advisory Committee for a minimum of four times;
- (d) conduct internal focus groups with the CEOs/EDs of the 30 member associations, select staff, board members and key leaders within the organization, and external consultations with key stakeholders/partners via virtual platforms and in-person, as needed;
- (e) Conduct an Environmental Scan;
- (f) Based on the above items of work, develop, and present a Strategic Issues report for review and feedback from the Strategic Planning Advisory Committee;
- (g) identify draft strategic priorities and directions;
- (h) provide decision-making support;
- (i) review consolidated feedback and finalise strategic direction and priorities;

- (j) lead the co-creation of a Theory of Change for YWCA Canada to center Justice, Equity, Diversity, and Inclusion (JEDI), anti-racism and Reconciliation work;
- (k) develop an operational plan template adaptable to each core services department of YWCA Canada (including Member Services, Informed Advocacy, Philanthropy, Comms), aligned with the new strategic priorities/objectives for 2024-2028;
- (l) create an evaluation framework to track and report the progress on the new strategic priorities outlined in the new strategic plan for 2024-2028;
- (m) report to designated representatives of the Strategic Plan Advisory Committee from time to time as required;
- (n) provide progress reports including financial updates as agreed upon or as required;
- (o) provide a final report and deliver all records upon conclusion of the Services; and
- (p) any other related tasks as may be recommended, requested, or approved by the Purchaser.

### **2.3 Objectives**

The Purchaser seeks a successful Firm that will:

- (a) work collaboratively with the Strategic Plan Advisory Committee;
- (b) provide opportunities for YWCA Member Associations to meaningfully contribute to the process;
- (c) undertake thorough due diligence throughout the process;
- (d) successfully deliver a new Strategic Plan encompassing YWCA Canada's values and directions based on trends and stakeholder consultations, and conveying the importance and future outcomes of YWCA Canada's impact on women, girls and gender diverse peoples accessing YWCA Canada's programs and services across the country; and
- (e) complete the Services according to an approved work plan, on time and on budget.

### 3.0 Key Milestones for the Services

Date	Milestone
To be discussed with successful Firm	Consultations and candidate profile completed
To be discussed with successful Firm	First round interviews with Search Committee
To be discussed with successful Firm	Initial meeting with the Advisory Committee
To be discussed with successful Firm	Presentation of a recommended work plan and process to the Advisory Committee
To be discussed with successful Firm	Internal Consultation
To be discussed with successful Firm	External Consultation
To be discussed with successful Firm	Environmental Scan
To be discussed with successful Firm	Strategic Issues Report
To be discussed with successful Firm	Theory of Change document
To be discussed with successful Firm	Operational Plan Template
To be discussed with successful Firm	Draft Strategic Plan (2024 - 2028)
To be discussed with successful Firm	Evaluation Framework
To be discussed with successful Firm	Final Report documenting the process, the work, and outcomes.
To be discussed with successful Firm	Draft Strategic Plan materials circulated to member associations in advance of the Annual Members Meeting
To be discussed with successful Firm	Presentation at Annual Members Meeting
To be discussed with successful Firm	Draft Strategic Plan delivered to Advisory Committee
To be discussed with successful Firm	Final Strategic Plan delivered to Advisory Committee
Mid-August 2024	Final Strategic Plan motion circulated to the CEOs/EDs 90 days in advance of the One Movement Meeting (October 2024)
Mid-October 2024	Final Operation Plan Template delivered to the CEO of YWCA Canada



(END)

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### Value of Contract

This is an open and competitive process. The price you quote should be inclusive. If your price excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees. YWCA Canada will negotiate contract terms upon selection.

### Pricing Instructions

The successful vendor will receive 25% payment at the signing of the contract, followed by 25% at the completion of each phase of the contract. This includes all deliverables. Your quote must identify various phases of work, copywriting and design and should include the following:

- Identify # of hours and costs for all phases of work
- Travel and accommodation for possible in person consultations at the One Movement Meeting in Ottawa, ON in October 2023 and 2024, at the CEO/ED meeting February 2024 (location tbc), the National Board meeting in Toronto, ON in February 2024 and to Gravenhurst, ON for the presentation of the draft Strategic Planning Report at YWCA Canada’s Annual Members Meeting June 6-8, 2024. The final Strategic Plan and related is expected to be completed by the Fall 2024 YWCA Canada’s One Movement meeting.

All pricing must be in Canadian dollars. Prices quoted should include HST.

### Timeframe

Call for proposals disseminated	August 8, 2023
Emailed questions accepted <a href="mailto:national@ywcacanada.ca">national@ywcacanada.ca</a>	August 8-14, 2023
Response to questions emailed	August 28, 2023
<b>Deadline for Proposals</b>	<b>September 7, 2023, 5pm EDT</b>
Advisory Committee meets to shortlist proponents	Early September 2023
Virtual interviews with short listed proponents	Mid-End of September 2023
Successful proponent confirmed and notified	End of September, 2023
All applicants notified	End of September, 2023
<b>Completion of Work</b>	<b>By One Movement Meeting, mid-October 2024</b>

<b>Evaluation Criterion</b>	<b>Weight</b>
Credentials, qualifications, and professional experience <ul style="list-style-type: none"> <li>• Track record of JEDI, anti-racism, and Reconciliation work (15 points)</li> <li>• Strategic Planning Experience (15 points)</li> <li>• Experience working with feminist/social justice organizations in the non-profit sector (10 points)</li> </ul> TOTAL: 40 points (minimum required 35 points)	30%
Demonstrated expertise and ability to meet requirements per the scope of Services <ul style="list-style-type: none"> <li>• Firm experience /expertise and professional staff (15 points)</li> <li>• Project approach and methodology (10 points)</li> <li>• Ability to work and deliver material in French &amp; English (10 points)</li> </ul> TOTAL: 35 points (minimum required 30 points)	30%
Demonstrated ability and capacity based on client preferences <ul style="list-style-type: none"> <li>• Demonstrated track record of project management principles (5 points)</li> <li>• Understanding of YWCA Canada principles (10 points)</li> </ul> TOTAL: 15 points (minimum required 10 points)	20%
Competitiveness of proposed fees and thoroughness of proposal, proposed contract terms or conditions <ul style="list-style-type: none"> <li>• Completeness of the proposal (5 points)</li> <li>• Cost of services and products to be provided (5 points)</li> </ul> TOTAL: 10 points	20%
GRAND TOTAL: 100 points	100%

### **Contract Contact**

The consultant(s) will report to YWCA Canada's National Board Chair and the CEO on project deliverables and will convene the Strategic Planning Advisory Committee regularly for ongoing progress and direction.

### **YWCA Canada Contact for inquiries:**

Attention Aline Nizigama, CEO at [national@ywcacanada.ca](mailto:national@ywcacanada.ca) with the subject line "Strategic Plan RFP Questions"